



SchoolNet C/S Training Manual

Cafeteria Procedures

Best viewed using the following Display Properties:

Color greater than 256

Display Resolution greater than 800 x 600

PURPOSE

This program is used to process food line transactions – payments, meals and ala Carte items for students, faculty, patrons and visitors.

Training Objectives

Cafeteria Login

Understand how configuring the POS Display Layout controls the appearance of the Cafeteria screen.

Understand how the various combinations of Cafeteria Settings controls the performance of the food line

Understand the Cafeteria screen

Find a consumer

Find a consumer district-wide

Scan barcodes to record transactions

Manual entry of ID numbers to record transactions

Add items to a transaction

Remove items from a transaction

Reset (cancel) a transaction

Use an >ONLY< food item button during a transaction. Understand how the transaction is affected.

Record a Payment

Delete a Payment

Edit transactions

Record Cash Sales for Students, Faculty, and Visitors

View Line Counts

Record Volume Sales

Record Banquet Sales

Troubleshoot the cause of a disabled food item button

Accessing Cafeteria

From the SchoolNet Main Menu, click on the Food Service button. From the Food Services menu, click on the **Cafeteria** button (or Alt-C on the keyboard).

For further information refer to Help:

Available through the NeTel website at:

<http://www.netel.com/webdoc/default.htm>

Tasks

Cafeteria login

Select **School** –

School defaults to the login site, read-only unless system login to the district has been completed as System Administrator.

Select **POS Configuration** –

Configurations are created in the POS Designer. Select the configuration having the menu you intend to use in your food line. Remember, a configuration may be used by more than one workstation.

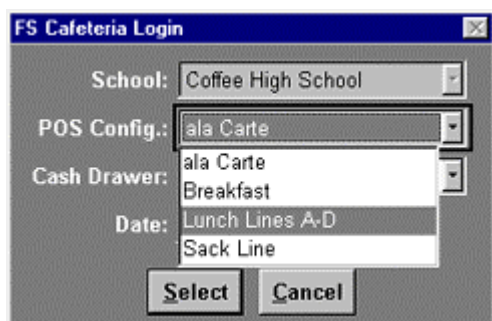


Fig. 1 – Select POS Configuration

Select **Cash Drawer** –

Select the cash drawer you will be using to run this food line. A Cash Drawer has three functions:

1. Reports identify payments and service by cash drawer. For reconciliation purposes a cash drawer should only be used by one workstation.
2. The cash drawer used to record food items and payments is included in consumer account records.
3. Cafeteria Settings are associated with the cash drawer selected during login.

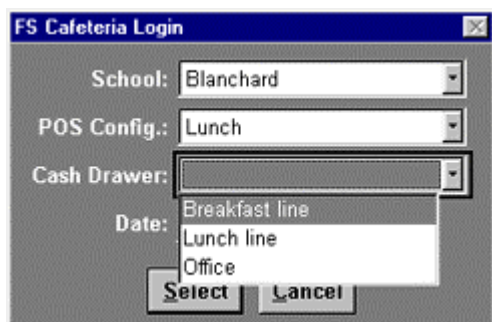


Fig. 2 – Select Cash Drawer

Select Cash Drawer (continued)

If a Cash Drawer is currently being used by another workstation, an alert will inform you and ask if you wish to unlock this drawer. It is recommended that you do not unlock a drawer, and that another Cash Drawer is selected instead. It is possible for an unused drawer to display this alert (computer has been turned off while the Cafeteria module was running, or a power failure, for instance). If this is the case, the drawer may be unlocked safely.

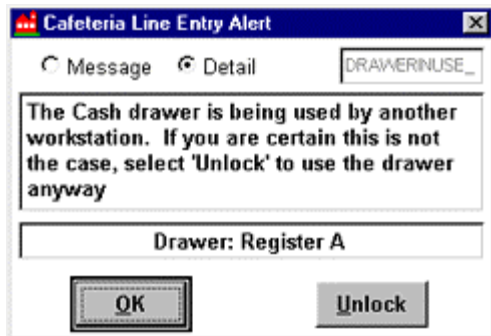


Fig. 3 – Drawer currently in use (alert detail)

If a Cash Drawer has been “Locked” (Cash Drawer Editor, POS Designer File menu), it is *not* available for use by the Cafeteria program. The Office Cash Drawer is usually assigned “Locked” status to prevent accidental use by the cafeteria. This restriction is designed to aid drawer reconciliation and prevent accidental mingling of office and cafeteria payments and service.

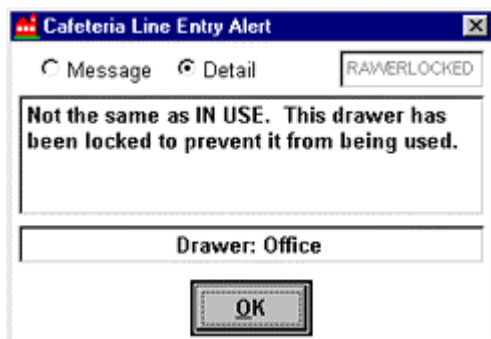


Fig. 4 – Locked Cash Drawer alert detail

Confirm **Date to Process**
Click on the **Select** button

The Cafeteria Screen

The screenshot shows the 'SchoolNet C/S Food Service Cafeteria [Register A]' window. It includes a menu bar (File, Settings, Volume Sales, Help) and a date field (03/04/1998). The main interface is divided into several sections:

- Top Section:** Contains 'Account' and 'Ident' fields. A dropdown menu is set to 'D' (District-wide). The 'Ident' field contains '45001186'. Buttons for 'Search' and 'Clear' are present.
- Consumer Name:** The name 'Adams, Ellie Anne' is displayed, followed by a gender indicator 'F' and a 'Clear' button.
- Service Type:** A row of buttons labeled 'Cash', 'Student', 'Faculty', 'Adult', and 'Child'.
- Meals Remaining:** A field showing '0' with the label 'Meals Remaining'.
- Balance Forward:** A field showing '0.05' with the label 'Bal Fwd'.
- Transaction Table:** A table with columns 'Description' and 'Amount'. It lists 'Lunch' (Meal), 'Juice' (0.25), and 'Dessert' (0.50). A 'Reset' button is to the left.
- Food Selection Grid:** A grid of buttons for food items: Lunch, Milk, Juice, Chicken Breast, Meat, Cheese Sandwich, Peanut Butter Sandwich, Vegetable, Fruit, Dessert, Hawaiian Punch, Cinnamon Roll, and Rolls. A 'Quit' button is at the bottom right.
- Payment Section:** Includes a 'Worker' button, a 'Reim Meal' checkbox (checked), an 'Additional' field (0.75), a 'Payment' field (5.00), and a 'Balance' field (3.40).
- Counts:** A button labeled 'Counts' is located at the bottom left.

Numbered callouts (1-15) point to specific elements: 1 points to the 'D' dropdown; 2 points to the 'Search' button; 3 points to the 'Cash' button; 4 points to the 'Meals Remaining' field; 5 points to the 'Bal Fwd' field; 6 points to the 'Reset' button; 7 points to the 'Undo' button; 8 points to the 'Counts' button; 9 points to the 'Description' column header; 10 points to the 'Amount' column header; 11 points to the 'Reim Meal' checkbox; 12 points to the 'Additional' field; 13 points to the 'Payment' field; 14 points to the 'Balance' field; 15 points to the 'Worker' button.

Fig. 5

1. **D** – insert a checkmark to expand consumer search to district-wide
2. **Search & Clear** buttons – Search for a consumer by name, Clear to remove consumer name
3. **Cash** buttons – records 1 anonymous service and payment per button consumer type
4. **Meals Remaining** – calculates account balance divided by one meal cost for this consumer
5. **Bal Fwd** – Account balance forward
6. **Reset** – cancels this transaction, clears consumer name
7. **Undo** – removes unsaved food items for this transaction
8. **Counts** – food line service counts (meals & ala Carte) for all food lines in use this session
9. **Description** – name(s) of food item(s) served to this consumer this meal session
10. **Amount** – cost of food item. First meal is potentially reimbursable meal, *Amount* will always display “Meal” (cost of reimbursable meal is never displayed for public view). Cost of “second” meal is displayed.
11. **Reim Meal** – Yes indicates reimbursable for this meal session has been served
12. **Additional** – total cost of items in addition to reimbursable meal. Does not include cost of reimbursable meal.
13. **Payment** – payment amount received in line. May be zero, or may contain a default payment amount (per Settings/Deficit Accounts, or use of Cash buttons).
14. **Balance** – Ending account balance. Balance forward minus food items, plus payments. Includes cost of reimbursable meal.
15. **Worker** button – converts reimbursable meal to earned meal status, adjusts Balance accordingly.

Find a Consumer

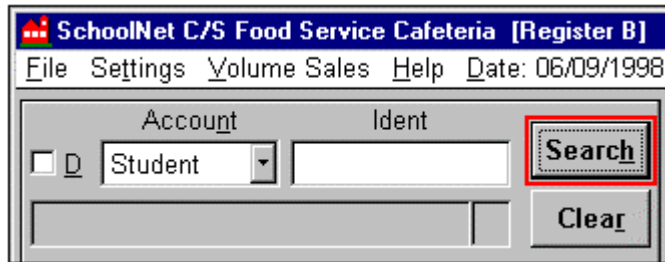
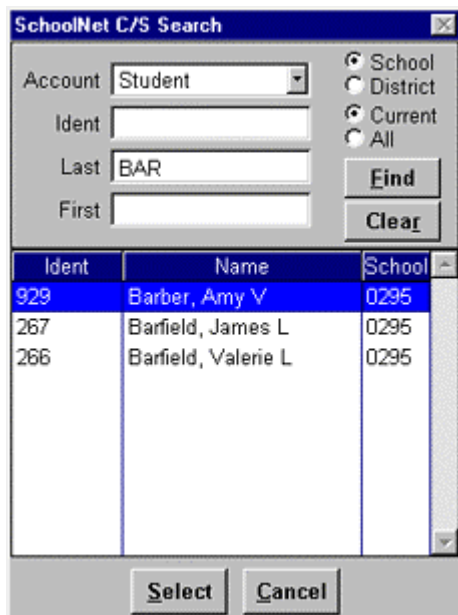


Fig. 6 – Search for consumer

If you are serving an individual from another school, and you either have a barcode to scan or know the consumer ID, place a checkmark in the **D** box to expand the search district-wide. Then scan the barcode or enter the ID number.

If a barcode is not available, or you do not have the ID number, click on the **Search** button.

1. Account defaults to Student. Change to Faculty or Patron if necessary.
2. School/District/Current/All – default settings are School/Current. Change to expand search if necessary. Note * -- if the D box has been checked prior to using the Search button, default setting is District, rather than School.
3. Enter a portion of the consumer Last name and click on **Find** (or use Alt-F).
4. Double-click on the consumer from the list of names meeting search criteria (or single-click, then use the **Select** button).
5. You will be returned to the Cafeteria screen, where service will proceed as per the Cafeteria Settings.



Ident	Name	School
929	Barber, Amy V	0295
267	Barfield, James L	0295
266	Barfield, Valerie L	0295

Fig. 7 – Search for consumer

Scan barcodes

Auto Serve ON and Auto Save ON?

Default meal is saved and the screen cleared.

Auto Serve ON and Auto Save OFF?

Press Enter twice to save default meal and clear (or click on the **Save** button).

Auto Serve OFF and Auto Save OFF?

Select meal and/or ala Carte, press Enter twice to save and clear (or click on the **Save** button).

Manual entry of student ID numbers

(focus on the Account field, moves automatically to the *Ident* field when a number is entered)

Enter student ID number and press Enter

Auto Serve ON and Auto Save ON?

Default meal is saved and the screen cleared.

Auto Serve ON and Auto Save OFF?

Press Enter twice to save default meal and clear (or click on the **Save** button).

Auto Serve OFF and Auto Save OFF?

Select meal and/or other food items, press Enter twice to save and clear (or click on the **Save** button).

Manual entry of faculty/patron ID numbers

(focus on the Account field)

Select Account Type (Faculty or Patron, press "F" or "P"). Focus moves to the Ident field.

Enter ID number and press Enter

Auto Serve ON and Auto Save ON?

Default meal is saved and the screen cleared

Auto Serve ON and Auto Save OFF?

Press Enter twice to save default meal and clear (or click on the **Save** button).

Auto Serve OFF and Auto Save OFF?

Select meal and/or other food items, press Enter twice to save and clear (or click on the **Save** button).

Record inline food Payments

Auto Save OFF to prevent automatic Save and Clear, or,

Rescan barcode or,

Re-enter ID number and press Enter

Focus defaults to Payment field

Enter payment amount

Press Enter twice (or click on the **Save** button, or use Alt-S).

Anonymous Cash Student

The Auto Save setting does *not* apply to transactions made using the CASH buttons

Notice ** a student meal recorded using the Cash Student button is recorded as a *Student Paid* status meal. Since it is an anonymous meal, it is not possible to associate a free/reduced status application with it to support eligibility status other than Paid. Also, it is not possible to track second meals for anonymous students. Therefore, a Food Service Preference setting controls the availability of the *Cash Student* button for **Meal** service (ala Carte purchase is not affected).

Cash Student Payment and meal

Press or click on the **Student** button

Auto Serve ON and AutoSave ON?

Payment and Service of the default meal is placed into the transaction grid but is not automatically saved and cleared. This allows additional food items to be added to the transaction. Notice that as a food item is added, the amount in the Payment field is increased by the cost of that item.

Auto Serve OFF?

Select meal and/or ala Carte items. Press Enter twice to record *Payment and Service*.

Anonymous Cash Faculty

The Auto Save setting does *not* apply to transactions made using the CASH buttons.

Press or click on the **Faculty** button

Auto Serve ON?

Click on the Faculty Cash button. The default meal is served and the amount of this meal is inserted into the Payments field as a default payment amount. Press Enter to accept, Enter again to save. (or click on the Save button)

Auto Serve OFF?

Select meal and/or other food items. The amount of the food items is inserted into the Payments field as a default payment amount. Press Enter to accept, Enter again to save. (or click on the Save button)

Cash Visitor Adult or Child

The Auto Save setting does *not* apply to transactions made using the CASH buttons.

Press or click on the **Adult** or **Child** Cash button

Auto Serve ON?

The default meal is served and the amount of this meal is inserted into the Payments field as a default payment amount. Press Enter to accept, Enter again to save. (or click on the Save button)

Auto Serve OFF?

Select meal and/or other food items. The amount of the food items is inserted into the Payments field as a default payment amount. Press Enter to accept, Enter again to save. (or click on the Save button)

Add Items to a Transaction

Auto Save OFF, or rescan card or re-enter ID number

Click on the item button for each additional food item to be added to this transaction. Notice that the amount in the *Additional* field reflects each additional item.

Notice that the focus remains at all times on the *Payment* field. This allows a payment to be entered at any time using the 10-keypad.

SchoolNet C/S Food Service Cafeteria [Register A]
File Settings Volume Sales Help Date: 03/13/1998

Account Ident Search
☐ Student 610
Anderson, Christopher A M Clear
Cash Student Faculty Adult Child

10 Meals Remaining Bal Fwd 9.45

Description	Amount
Lunch	Meal
Hawaiian Punch	0.55

Reset Undo Save Counts

Worker Reim Meal Yes
Additional 0.55
Payment 0.00
Balance 8.00

Lunch other
Lunch Milk Juice
Chicken Breast Meat Cheese Sandwich
Peanut Butter Sandwich Vegetable Fruit
Dessert Hawaiian Punch
Cinnamon Roll Smp Milk
Rolls ala Carte Milk >ONLY<
Quit

Fig. 8 – add items to a transaction

Remove items from a transaction

Click on an item to remove it.

Use the **Undo** button to remove all *unsaved* items. The **Reset** button cancels this transaction, but previously saved items are retained.

Save changes

How to use an >ONLY< Food Item button

See training curriculum document *POS Designer / Create a POS Configuration* for instructions on how to create this type of food item button. Also see Food Services documentation Sec. 12b, Add a POS Configuration.

How an >ONLY< button performs in the food line.

When a button using the >ONLY< text in Caption Line 2 is used in the food line, *all food items* present in the transaction are **replaced** by the food item represented by the >ONLY< button. **Payments are not affected.**

SchoolNet C/S Food Service Cafeteria [Register A]
File Settings Volume Sales Help Date: 03/13/1998

Account Ident Search
☐ Student 610
Anderson, Christopher A M Clear

Cash Student Faculty Adult Child

11 Meals Remaining Bal Fwd 9.45

Reset

Description	Amount
Payment	-0.55
Milk	0.25

Undo

Save

Worker Reim Meal Additional 0.25 Payment 0.00 Balance 9.75

Counts

Quit

Menu Grid:

Lunch	Milk	Juice
Chicken Breast	Meat	Cheese Sandwich
Peanut Butter Sandwich	Vegetable	Fruit
Dessert	Hawaiian Punch	
Cinnamon Roll		Smp Milk
Rolls		ala Carte Milk >ONLY<

Fig. 9 – Milk >ONLY< button, all food items replaced, payment retained

Edit a saved transaction (today)

Saved transactions may only be edited by same the Cash Drawer used to record the original transaction.

Rescan barcode or Re-enter ID number
Consumer and transactions displayed

Delete item (food item or payment, saved or unsaved)
Click on or touch item to delete
Save changes

Reset (cancel) entire transaction
Click on the **Reset** button to cancel this transaction and clear consumer information from the screen. Do not confuse reset with void. Saved items (displayed in **red Italics**) are not removed from the consumer account. See Delete item above.

Edit Payment amount

A previously saved payment displays in the items grid. If this amount is incorrect, *delete the existing payment* (see Delete item, above). The focus remains on the Payment field. Re-type the correct payment amount.
Save

SchoolNet C/S Food Service Cafeteria [Register A]

File Settings Volume Sales Help Date 08/07/98

Account Ident
☐ Student 610
Anderson, Christopher A M Clear

Cash Student Faculty Adult Child

9 Meals Remaining Bal Fwd 9.45

Reset Undo Save

Description	Amount
Payment	-0.55
Lunch	Meal
Hawaiian Punch	0.55
Milk	0.25

Worker Reim Meal Yes Additional 0.25 Payment 0.00 Balance 8.30

Menu Grid:

- Lunch, Milk, Juice
- Chicken Breast, Meat, Cheese Sandwich
- Peanut Butter Sandwich, Vegetable, Fruit
- Dessert, Hawaiian Punch
- Cinnamon Roll, Smp Milk
- Rolls, ala Carte Milk >ONLY<

Fig. 10 – Edit saved transaction

Previously saved reimbursable meal

Previously saved payment

Current unsaved item

Previously saved ala Carte food item

Focus on Payments field to receive new payment

Process Volume Sales Transactions

Click on *Volume Sales* or press **Alt-V** to open the menu (Cafeteria screen menu bar). Select **Volume Sales** or press **Ctrl-V** to run the Volume Sales program.

1. Select *Item* – meal or ala Carte (drop down list)
2. Select *food item* - (drop down list)
3. Select *Rate* (Student, Faculty, Adult or Child). Notice that the *Each* field is read-only, and may change for different consumer *Rates*.
4. Enter *Quantity*.
5. *Amount* is calculated automatically (*Each* x *Qty*) and is displayed read-only.
6. *Payment* defaults to the *Amount* figure, but may be edited to reflect the actual amount received to allow for overages or shortages.
7. **Save**
8. **Done**

Meal		Date
Lunch		08/07/1998
Item		
ala Carte item		Each
Milk		0.35
Rate		
<input checked="" type="radio"/> Student <input type="radio"/> Faculty <input type="radio"/> Adult <input type="radio"/> Child		
<input type="checkbox"/> Worker		
Qty.	Amount	Payment
27	9.45	9.45
Save Cancel		

Fig. 11 – Volume Sales transaction

Process Volume Sales Transactions / Banquet Sales

Cafeteria menu bar, click on Volume Sales or press Alt-V to open the menu. Select Volume Sales or press Ctrl-V to run the Volume Sales program.

1. Select *Item – ala Carte*
2. Select **Banquet Sales** ala Carte item (or Catering, Concessions, etc.)
3. Enter the *Each* price. Notice that the *Each* price displays “0.00” (the rate set in Items for a Banquet Sales ala Carte Item), and may be edited. This allows for the varying prices of catered meals.
4. Select *Rate* (Student, Faculty, Adult or Child))
5. Enter *Quantity*.
6. *Amount* is calculated automatically (*Each x Qty*), and displays read-only.
7. *Payment* may be edited to reflect the actual amount received to allow for overages or shortages.
8. **Save**
9. **Done**

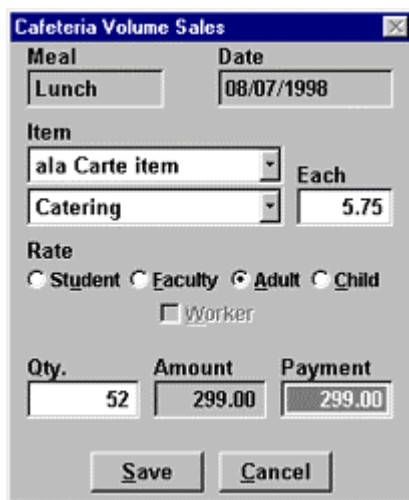


Fig. 12– Banquet Sales transaction

A disabled food item button

Food Items use optional *effective and expire* dates to determine when an item is available. If effective and expire dates are not used, then the item is assumed to be available at all times.

If effective and expire dates are used, then the item is available only within that date range. A food item button will appear disabled (grayed out) if Cafeteria login is completed using a date that is *outside* that item's available date range.

Locate the POS configuration in Food Services POS Designer. Verify the food item referenced by the button by examining the button's properties (Food Service documentation, Sec. 12c). Then locate that food item in Food Service *Items* and examine the effective and expire dates.